

FMMI PVND REQUEST PROCESS FOR CUSTOMERS

QUICK REFERENCE GUIDE

INTRODUCTION

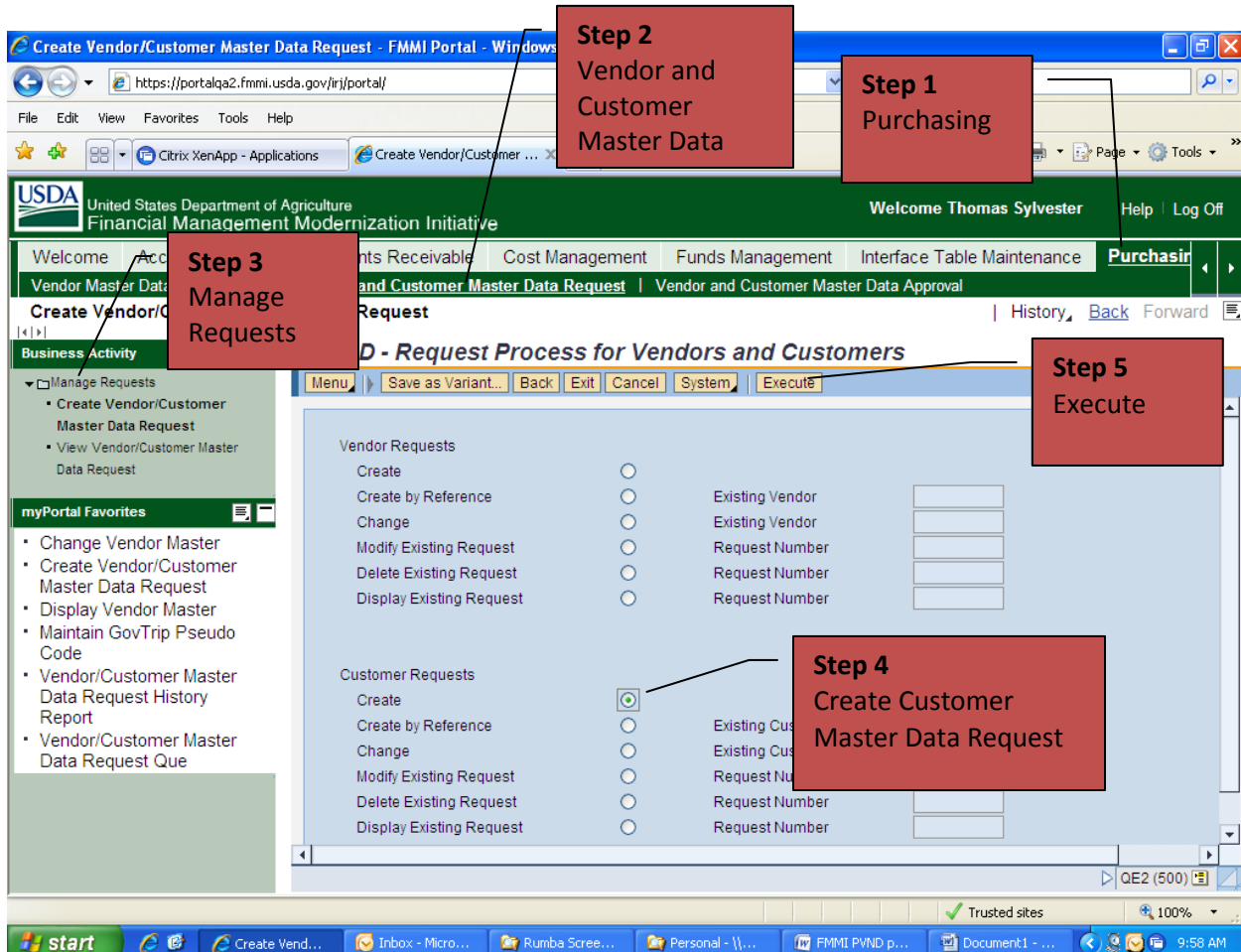
This guide provides USDA Financial Management Modernization Initiative (FMMI) agencies with the steps to prepare the preapproval vendor request (PVND) for customers.

QUICK STEPS

Login to the FMMI Web site at <https://portal.fmmi.usda.gov/irj/portal/>.

Click:

1. Purchasing Tab
2. Vendor and Customer Master Data Request
3. Manage Requests
4. Select Customer Requests (Create)
5. Execute



The screenshot shows the FMMI Portal interface with five red callout boxes indicating the steps:

- Step 1: Purchasing** - Points to the 'Purchasing' tab in the top navigation bar.
- Step 2: Vendor and Customer Master Data** - Points to the 'Vendor and Customer Master Data Request' link in the left sidebar.
- Step 3: Manage Requests** - Points to the 'Manage Requests' link in the left sidebar.
- Step 4: Create Customer Master Data Request** - Points to the 'Create' radio button under the 'Customer Requests' section.
- Step 5: Execute** - Points to the 'Execute' button in the top right of the main content area.

The main content area displays the 'Request Process for Vendors and Customers' form, which includes sections for 'Vendor Requests' and 'Customer Requests'. The 'Customer Requests' section is currently selected, showing options to 'Create', 'Create by Reference', 'Change', 'Modify Existing Request', 'Delete Existing Request', and 'Display Existing Request'. The 'Create' option is selected with a radio button.

SAP

Menu System

Enter Agency

Agency

AM00 Ag Marketing S
 AO00 Advocacy & Ou
 AP00 APHIS
 AR00 Ag Research Svc
 BP00 Office of Budg/Progr
 CC00 Commodity Credit Cor
 CF00 Office of the CFO
 CM00 Office of Communica
 CR00 Office of Civil Righ
 DA00 Dept Administration
 EC00 Office of Chief Econ
 30 Entries found

Select Agency from drop down list

Once agency is selected, click green check or enter button.

Create Vendor/Customer Master Data Request - FMFI Portal - Windows Internet Explorer

https://portalqa2.fmmi.usda.gov/irj/portal/

File Edit View Favorites Tools Help

USDA United States Department of Agriculture Financial Management Modernization Initiative

Welcome Thomas Sylvester Help Log Off

Welcome Accounts Payable Accounts Receivable Cost Management Interface Table Maintenance Purchasing

Vendor Master Data Maintenance Vendor and Customer Master Data Customer Master Data Approval

Create Vendor/Customer Master Data Request

PVND Customer Request

Menu Back Exit Cancel System Next Screen

Requestor Information

Name Thomas Sylvester
 Agency Agricultural Research Service
 Email thomas.sylvester@usda.gov
 Phone Extension

Request Information

Request Number INTERNAL
 Type CREATE
 Date 12/14/2010
 Time 09:42:51
 Status
 Customer Created

Additional Requestor Information

Name Change
 Email Remove
 Phone Extension

COD Reviewer Information

Name
 Email

Customer Information

Name JOHNNY E BRAVO
 Account Grp COMM Industry
 SSN 123456789 TIN
 TIN Verification Date 12/14/2010

Click when all areas are filled

Optional fields

Required field

Required field

AGST 7Z USDA Ship/Bill To
 BANK 3Z Bank Customer
 COMM 03 Commercial Customer
 EMPL 04 Employee Customer
 FED 05 Federal Customer
 FORC 08 Foreign Commercial Customer
 FORG 09 Foreign Government Customer
 SNL 06 State & Local Customer
 USDA 07 USDA Agency Sold to Party

Selections appear from above drop-down list.

Create Vendor/Customer Master Data Request - FMFI Portal - Windows Internet Explorer

https://portalqa2.fmmi.usda.gov/irj/portal/

File Edit View Favorites Tools Help

United States Department of Agriculture
Financial Management Modernization Initiative

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Vendor Master Data Maintenance | Vendor and Customer Master Data Request | Vendor

Create Vendor/Customer Master Data Request

PVND Customer Request

Menu Back Exit Cancel System Previous Screen Save & Submit

When done click Save & Submit

Line 1 required
Lines 2, 3 optional

City, Country, State required

Lockdown for agency adding record

Once record is completely filled out, click Save & Submit.

Form fields include:

- Number: INTERNAL, JOHNNY E BRAVO
- Name: JOHNNY E BRAVO
- Federal Information: Trading Partner, Fee Schedule, IRS Match Type, Dunning Procedure, ALC, Customer Group, Acct Statement, Dunning Area
- Banking Information: Routing No., Bank Number, Account Type
- Blocking Information: Sales Area Blocks, Order Block, Delivery Block, Billing Block, Company Code Blocks, Posting Block, Marked for Deletion, Blocking Changes only by Agency
- Address Information: Address Line 1 (123456 SAINTS BLVD), Address Line 2 (APT 2123), Address Line 3 (SUITE B), City (NEW ORLEANS), Country (US), State (LA), Zip Code (70126-0000), Number (504-426-5377)

This is the final step for the agency user.

Once saved, an automatically generated e-mail will be issued to the requestor and any additional requestors adding notifying that the request has been submitted.

From: Thomas Sylvester [thomas.sylvester@usda.gov]
To: FPCDEBTMGMT@FSIS.USDA.GOV; THOMAS.SYLVESTER@usda.gov
Cc:
Subject: PVND Request 0000003159 - NEW

The following CUSTOMER request has been submitted:

Request Number: 0000003159
Name: UTAH DEPT OF AGRIC & FOOD
Action: CREATE
Status: NEW

When completed by the Accounting Processing Branch, Table Maintenance Section (TMS), an automatically generated e-mail will be issued to the requestor and any additional requestors added notifying that the request has been approved.

From: Thomas Sylvester [thomas.sylvester@usda.gov]
To: FPCDEBTMGMT@FSIS.USDA.GOV; THOMAS.SYLVESTER@usda.gov
Cc:
Subject: PVND Request 0000003159 - APPROVED

The following CUSTOMER request has been submitted:

Request Number: 0000003159
Name: UTAH DEPT OF AGRIC & FOOD
Action: CREATE
Status: APPROVED
Customer Created: 0003262224

Please direct any questions to TMS at **504-426-5377**.